


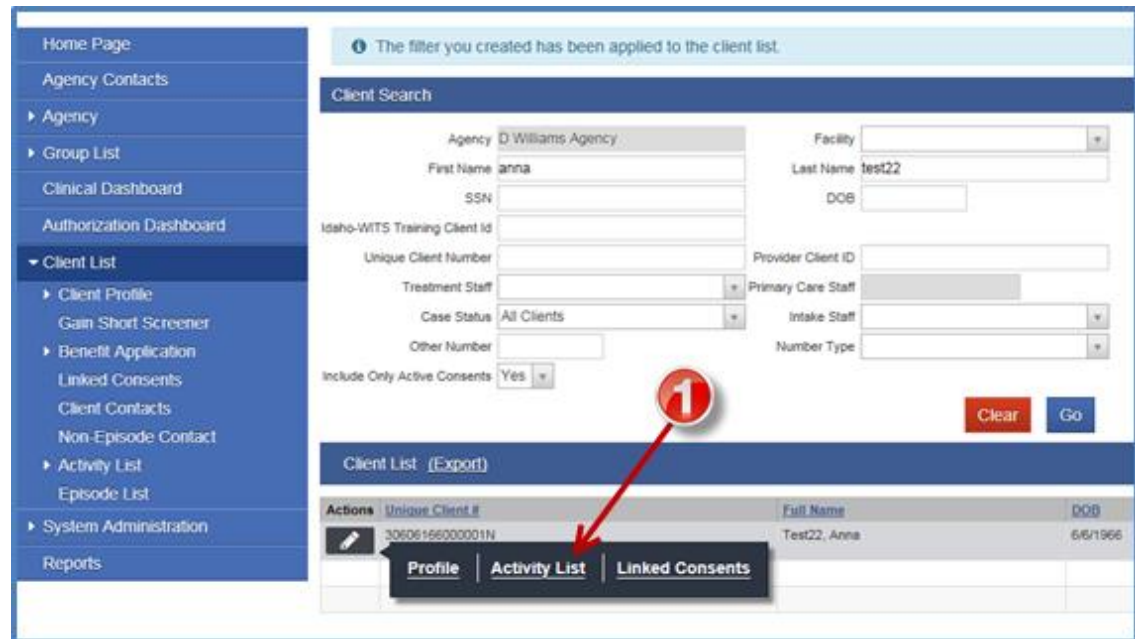
Creating and Billing Unsuccessful Follow Up Attempts for DHW and IDJC Clients

NOTE:

- Clients must sign an informed consent specific to outcome data collection located on the WITS website.
- Do not complete a Follow Up for an ATR funded client.
- An Authorization is not required to bill for the Follow Up Survey.

Complete an Unsuccessful Follow Up

1. **Getting here:** Login, click **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, locate the client name and hover over  under Actions and click **Activity List**.





The filter you created has been applied to the client list.

Client Search

Agency: D Williams Agency | Facility: | First Name: anna | Last Name: test22 | SSN: | DOB: | Idaho-WITS Training Client Id: | Unique Client Number: | Provider Client ID: | Treatment Staff: | Primary Care Staff: | Case Status: All Clients | Intake Staff: | Other Number: | Number Type: | Include Only Active Consents: Yes

Client List (Export)

Actions	Unique Client #	Full Name	DOB
 Profile Activity List Linked Consents	30606166000001N	Test22, Anna	6/6/1966

2. Hover over  under Actions and click **Review** to review the Episode of Care.

Episode List							
Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE
	1	Closed	Williams Treatment	Van Skike, Anna	5/25/2016	7/1/2016	Williams Treatment/Ado
Review							

3. Click **Follow Up** on the Navigation Pane (left menu) under the Activity List.

Home Page

Agency Contacts

▶ Agency

▶ Group List

Clinical Dashboard

Authorization Dashboard

▼ Client List

▶ Client Profile

Gain Short Screener

▶ Benefit Application

Linked Consents

Client Contacts

Non-Episode Contact

▼ Activity List

Intake

Fee Determination

Wait List

▶ Screening

▶ Assessments

▶ ASAM

Diagnosis List

▶ Admission

Program Enroll








▶ Encounters

▶ Notes

▶ Treatment

▶ Follow-up

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	5/25/2016	5/25/2016	Completed
	Intake Transaction	5/25/2016	5/25/2016	Completed
	Admission	5/25/2016	5/25/2016	Completed
	Client Program Enrollment (Adolescent Intensive Outpatient)	5/25/2016	5/25/2016	Completed
	Encounter Summary	5/25/2016	5/25/2016	Completed
	Discharge	7/1/2016	7/1/2016	Completed
	Diagnosis Summary	7/1/2016	5/25/2016	Not Applicable

3

NOTE: Update all contact information for the client as applicable.

4. Click Add New Annual Update Record.

Follow-Up List

Add New Annual Update Record

Actions	Follow-Up Type	Follow-Up Status	Discharge Date	Follow-Up Date

Addresses

Add Address

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 Test St Boise, ID 83702	No	5/25/2016	5/25/2016

Current Collateral Contacts

Add New Contact

Actions	Type	Name	Address	Phone

5. Select the **Follow Up Type** and the **County of Residence**.

6. Select a **Follow Up** Status from the list below indicating why the Follow Up survey was not completed:

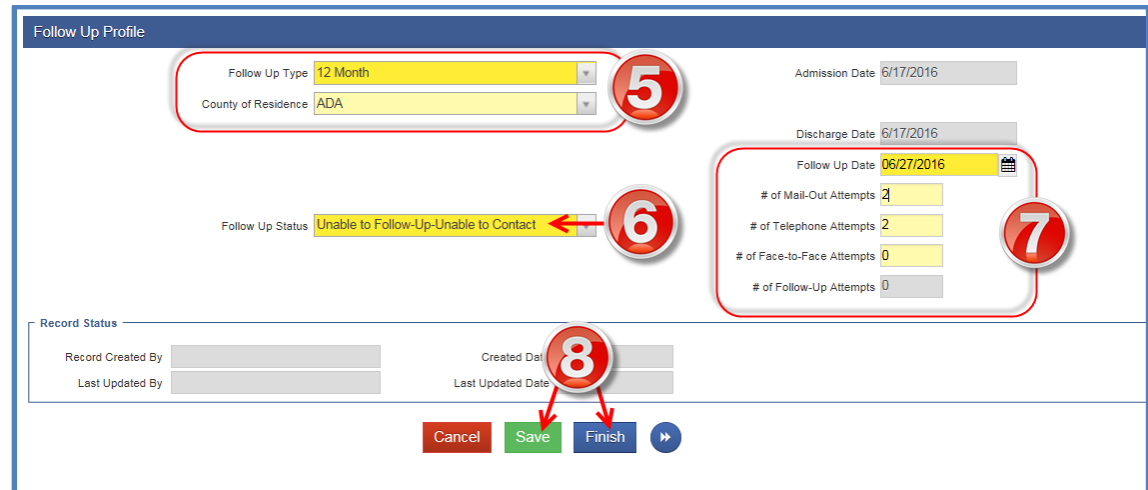
- **Unable to Follow-Up-Awaiting Response**
- **Unable to Follow-Up-Incarcerated**
- **Unable to Follow-Up-Transferred**
- **Unable to Follow-Up-Unable to Contact**

7. **Complete all fields.**

NOTE: Create four (4) unsuccessful attempts to contact client, each attempt must be conducted on separate days. Documentation for each attempt will be recorded on the Activity List as a Follow Up attempt in a completed status. Once the fourth unsuccessful attempt is complete, you may proceed to bill for the unsuccessful attempts.

8. Click  and .

NOTE: When there are 3 Follow Ups with the status of Unable to Follow-Up (Awaiting Response) and a 4th Follow Up is entered with a status of Unable to Contact, WITS will automatically open the Intake and create the Follow Up Program Enrollment.



The screenshot shows the 'Follow Up Profile' form with the following fields and values:

- Follow Up Type:** 12 Month (Callout 5)
- County of Residence:** ADA (Callout 5)
- Admission Date:** 6/17/2016
- Discharge Date:** 6/17/2016
- Follow Up Date:** 06/27/2016 (Callout 7)
- # of Mail-Out Attempts:** 4 (Callout 7)
- # of Telephone Attempts:** 2 (Callout 7)
- # of Face-to-Face Attempts:** 0 (Callout 7)
- # of Follow-Up Attempts:** 0 (Callout 7)
- Follow Up Status:** Unable to Follow-Up-Unable to Contact (Callout 6)
- Record Status:**
 - Record Created By: [Empty]
 - Last Updated By: [Empty]
 - Created Date: [Empty]
 - Last Updated Date: [Empty] (Callout 8)

At the bottom, there are four buttons: Cancel, Save, Finish, and a right arrow button.

Create a Client Group Enrollment

1. Click **Client Profile** and **Client Group Enrollment** on the Navigation Pane (left menu).

NOTE: Create a new Client Group Enrollment each time you are billing for a 4th Unsuccessful Follow Up with a status of Unable to Contact.

The screenshot shows the 'Profile' form in a web application. On the left is a navigation pane with a blue background. The 'Client Profile' menu item is highlighted with a red circle containing the number '1' and a red arrow pointing to it. The main form area contains fields for personal information: First Name (Anna), Middle Name, Last Name (Test22), Suffix, Gender (Female), DOB (6/6/1966), and SSN (000-00-0000). There are also fields for Provider Client ID, Unique Client Number (3060616), State Client ID, Record Created By (Van Skik), Last Updated By (Clinical S), Created Date (5/25/201), and Last Updated Date (6/21/201). Below these are fields for Driver's License, Access Category, and a file upload button. At the bottom right are 'Cancel' and 'Save' buttons.

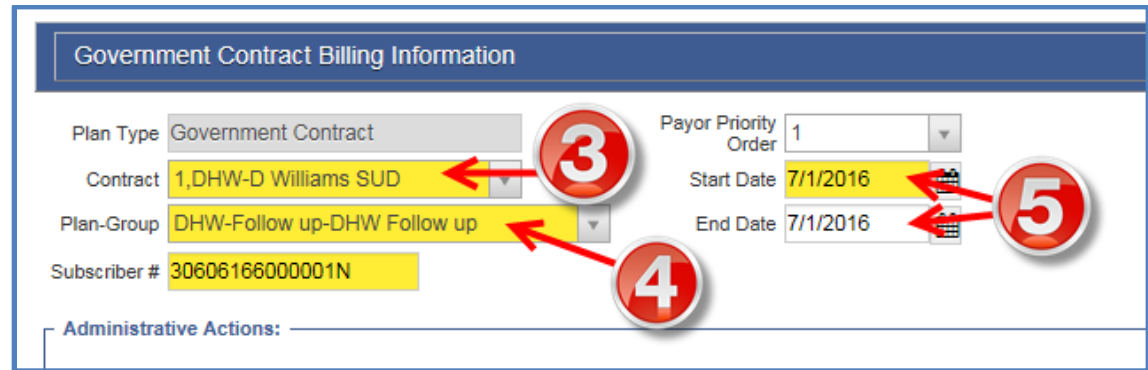
2. Click **Add Government Contract Enrollment**.

The screenshot shows a table titled 'Payor List'. The table has columns: Actions, Priority, Plan, Group, Contract, Subscriber/ Acct#, Subscriber/ Resp Party, Start Date, and End Date. The first row of data shows: State General, DHW Adult, DHW-D Williams SUD, 30606166000001N, and dates 7/1/2015 to 6/30/2016. Above the table are two buttons: 'Add Benefit Plan Enrollment' and 'Add Government Contract Enrollment'. A red circle containing the number '2' and a red arrow point to the 'Add Government Contract Enrollment' button.

Actions	Priority	Plan	Group	Contract	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date
		State General	DHW Adult	DHW-D Williams SUD	30606166000001N		7/1/2015	6/30/2016

3. Select the Contract that starts with “DHW” or “IDJC” followed by your agency name
(whichever is applicable.)
4. Select DHW Follow up or IDJC-Follow Up as the Plan Group.
5. Enter the day you completed the Follow-Up as the Start and End Date.

6. Click  .



Government Contract Billing Information

Plan Type: Government Contract

Contract: 1,DHW-D Williams SUD

Plan-Group: DHW-Follow up-DHW Follow up

Subscriber #: 30606166000001N

Payor Priority Order: 1

Start Date: 7/1/2016

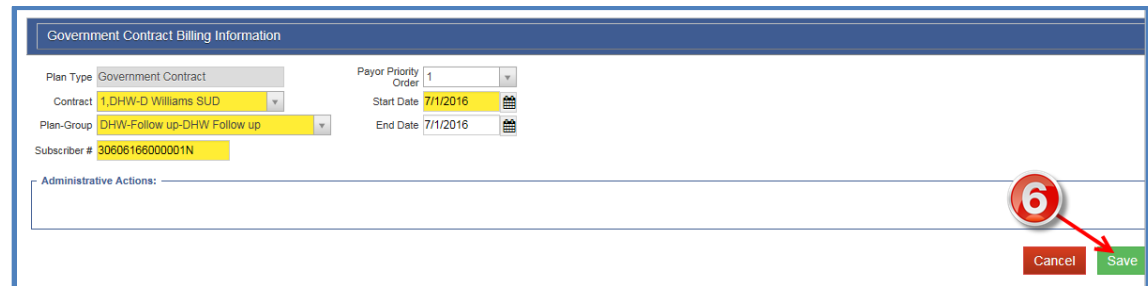
End Date: 7/1/2016

Administrative Actions:

Callout 3 points to the Contract dropdown menu.

Callout 4 points to the Plan-Group dropdown menu.

Callout 5 points to the Start and End Date fields.



Government Contract Billing Information

Plan Type: Government Contract

Contract: 1,DHW-D Williams SUD

Plan-Group: DHW-Follow up-DHW Follow up

Subscriber #: 30606166000001N

Payor Priority Order: 1

Start Date: 7/1/2016

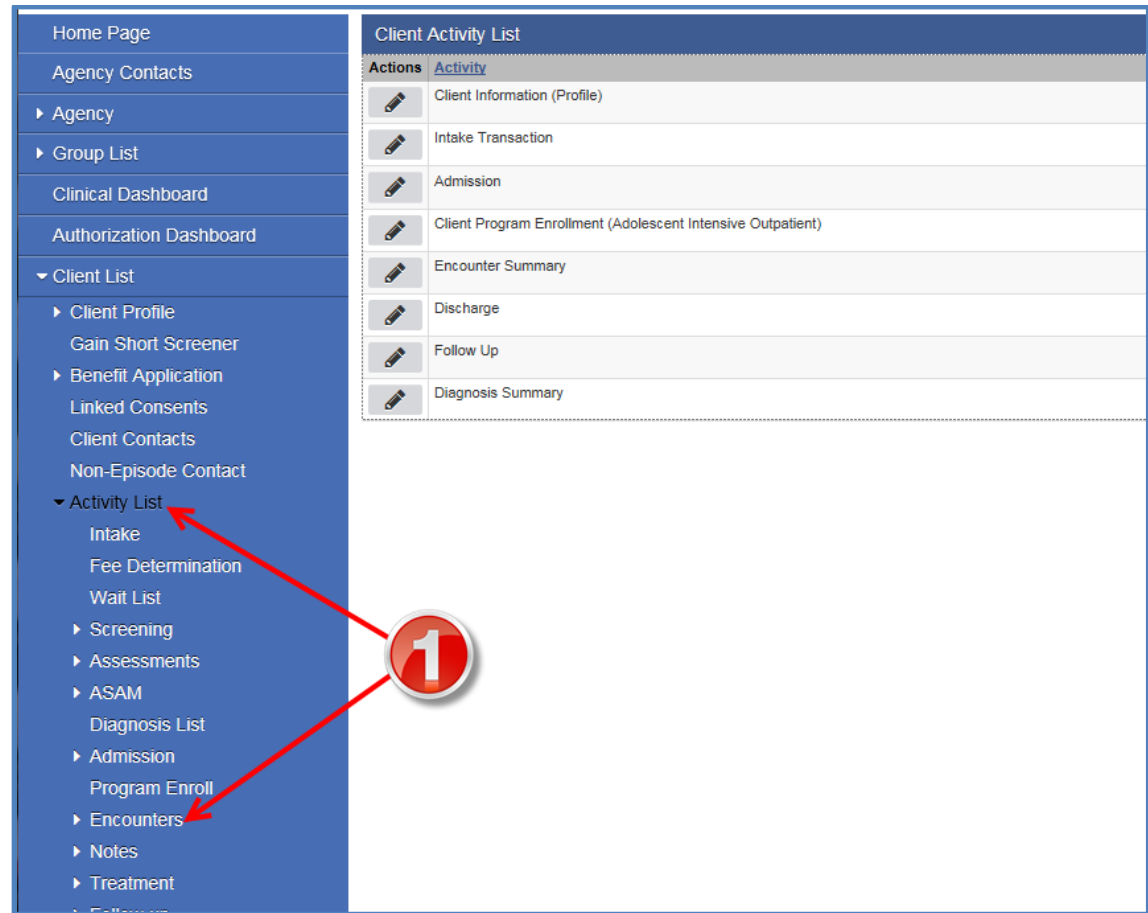
End Date: 7/1/2016

Administrative Actions:

Callout 6 points to the Save button.

Bill for Unsuccessful Follow Up Survey Attempts (Create an Encounter)

1. Click **Activity List** and **Encounters** on the Navigation Pane.



The screenshot shows the navigation pane on the left and the Client Activity List on the right. The navigation pane has a blue background with white text. The Client Activity List has a blue header and a white body. A red circle with the number 1 is placed over the 'Encounters' link in the navigation pane. Red arrows point from the 'Activity List' and 'Encounters' links in the navigation pane to the red circle with the number 1.

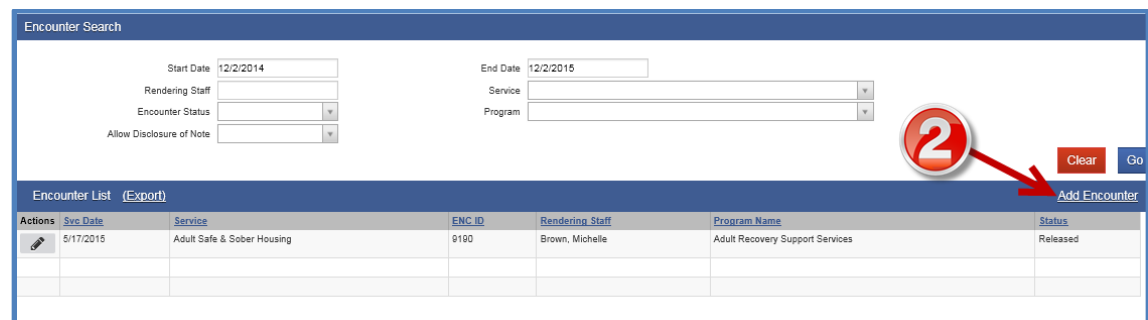
Navigation Pane:

- Home Page
- Agency Contacts
- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- Authorization Dashboard
- ▼ Client List
 - ▶ Client Profile
 - Gain Short Screener
 - ▶ Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
 - ▼ Activity List
 - Intake
 - Fee Determination
 - Wait List
 - ▶ Screening
 - ▶ Assessments
 - ▶ ASAM
 - Diagnosis List
 - ▶ Admission
 - Program Enroll
 - ▶ Encounters
 - ▶ Notes
 - ▶ Treatment

Client Activity List:

Actions	Activity
	Client Information (Profile)
	Intake Transaction
	Admission
	Client Program Enrollment (Adolescent Intensive Outpatient)
	Encounter Summary
	Discharge
	Follow Up
	Diagnosis Summary

2. Click **Add Encounter**.



The screenshot shows the Encounter Search form and the Encounter List table. The Encounter Search form has fields for Start Date, End Date, Rendering Staff, Encounter Status, Allow Disclosure of Note, Service, and Program. The Encounter List table has columns for Actions, Svc Date, Service, ENG ID, Rendering Staff, Program Name, and Status. A red circle with the number 2 is placed over the 'Add Encounter' button. A red arrow points from the 'Add Encounter' button to the red circle with the number 2.

Encounter Search:

Start Date: 12/2/2014 End Date: 12/2/2015

Rendering Staff: Service: Program:

Encounter Status: Allow Disclosure of Note:

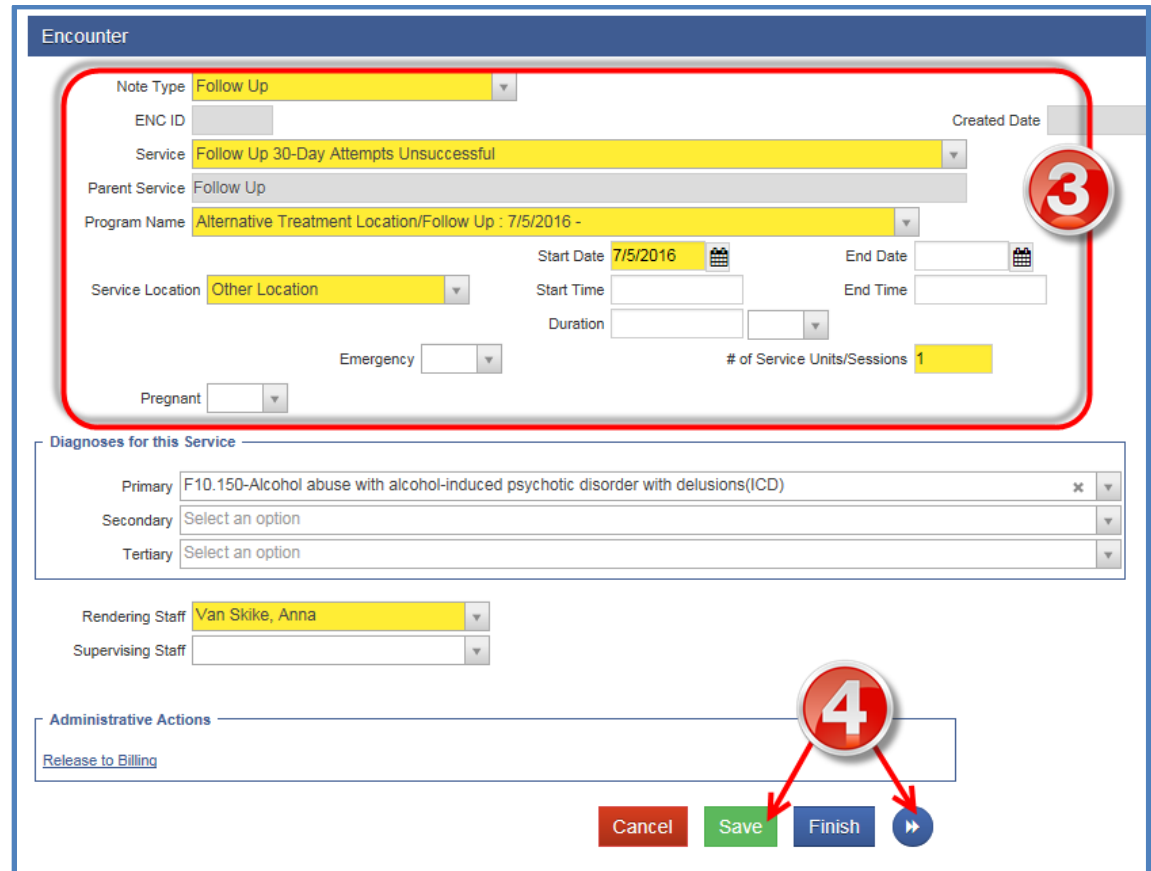
Encounter List (Export):

Actions	Svc Date	Service	ENG ID	Rendering Staff	Program Name	Status
	5/17/2015	Adult Safe & Sober Housing	9190	Brown, Michelle	Adult Recovery Support Services	Released

3. Complete the following:

- Select **Follow Up** as the **Note Type**
- Select the **Service** of **Follow Up 30-Day Attempts Unsuccessful**, **Follow Up 6-Month Attempts Unsuccessful**, or **Follow Up 12-Month Attempts Unsuccessful**
- Enter the **Start Date**
- Select the **Service Location**
- **Enter 1** for the **# of Service Units/Sessions**.

4. Click  and .



The screenshot shows the 'Encounter' form with the following fields and values:

- Note Type: **Follow Up**
- ENC ID: [Empty]
- Created Date: [Empty]
- Service: **Follow Up 30-Day Attempts Unsuccessful**
- Parent Service: **Follow Up**
- Program Name: **Alternative Treatment Location/Follow Up : 7/5/2016 -**
- Start Date: **7/5/2016**
- End Date: [Empty]
- Service Location: **Other Location**
- Start Time: [Empty]
- End Time: [Empty]
- Duration: [Empty]
- Emergency: [Empty]
- # of Service Units/Sessions: **1**
- Pregnant: [Empty]

Annotation 3 points to the top section of the form.

Diagnoses for this Service:

- Primary: **F10.150-Alcohol abuse with alcohol-induced psychotic disorder with delusions(ICD)**
- Secondary: **Select an option**
- Tertiary: **Select an option**

Rendering Staff: **Van Skike, Anna**

Supervising Staff: [Empty]

Administrative Actions:

- [Release to Billing](#)

Annotation 4 points to the bottom section of the form, specifically the 'Save' and 'Finish' buttons.

Buttons at the bottom: **Cancel**, **Save**, **Finish**, and a **Next** button.

5. **Enter a note** in the Unsigned Note section.

NOTE: Document the four methods used to attempt to contact client.

6. Click **Sign Note**.

7. Click **Save**.

8. Click **Release to Billing**.

NOTE: When the Encounter Releases to Billing, WITS will prompt you to close the case (Intake).

9. Select **Yes** when prompted to close the case.

NOTE: WITS will automatically close the Follow Up Program Enrollment when the Intake is closed.

The screenshot displays the WITS interface for adding and signing a note. At the top, there is a 'Signed Notes' section with a red circle '7' pointing to a grey bar. Below this is an 'Unsigned Notes' section with a text area labeled 'notes'. A red circle '5' points to the 'Enter notes' text. To the right of the text area, there are buttons for 'Add Note' and 'Sign Note', with a red circle '6' pointing to the 'Sign Note' button. Above the 'Sign Note' button, there are buttons for 'Cancel', 'Save', and 'Finish', with a red circle '7' pointing to the 'Save' button. Below the 'Sign Note' button, there is a section titled 'Administrative Actions' with a link 'Release to Billing', which is pointed to by a red circle '8'.

The screenshot displays a prompt in the WITS interface: 'Encounter has been released to billing. Do you want to close this case also?'. Below the prompt are two buttons: 'Yes' and 'No'. A red circle '9' points to the 'Yes' button.